



# PARTNERING FOR A SUSTAINABLE SECTOR



# Contents

- The year in review.....2
- Research and publications .....4
- Forum meetings .....5
- Working groups.....7
- Mirrors or Movers V.....8
- Online .....11
- The participants .....11
- Plans for 2018 .....12
- Forum meetings .....12
- Mirrors or Movers VI.....12
- Materiality publication.....13
- About the Forum.....13
- Objectives.....13
- Participating in the Forum.....13
- Income.....14
- Governance .....14

## The year in review

In 2017, the societal impacts of media remained a topic of global focus, and not only inside media companies. Our 'feeds' were filled with the fall-out from controversial votes, talk of fake news and echo chambers, bots and declining trust in the institutions that society rests on.

Set against this backdrop, it's increasingly understood that the sector's most significant impacts are its unique 'brainprint'.

Whether by putting structures in place to ensure that perspectives are balanced, or adopting a proactive stance on important societal or environmental issues; media companies are increasingly expected to manage their content impacts

And what's more, content isn't just everyone's business... it seems that everyone's business is content. From retail to telecoms to finance, lots of companies are in effect becoming media companies with significant publishing and content distribution activities.

Set against this context, it was a busy year for the Responsible Media Forum (RMF). As a collaborative initiative between some of the world's largest media companies, our activities foster discussion and learning about how to meet growing societal expectations. In 2017, noteworthy Forum developments and activities included:

24

CaracolTV and Mediaset joining the Forum, bringing the total number of participating companies to 24

Our global reach grew, with participating media companies headquartered in 10 countries and three continents: UK, France, Germany, Sweden, Denmark, Norway, Spain, Colombia, USA; Europe, North America, South America

10

Following extensive research and consultation, we published our in-depth report on The Future of Responsible Media

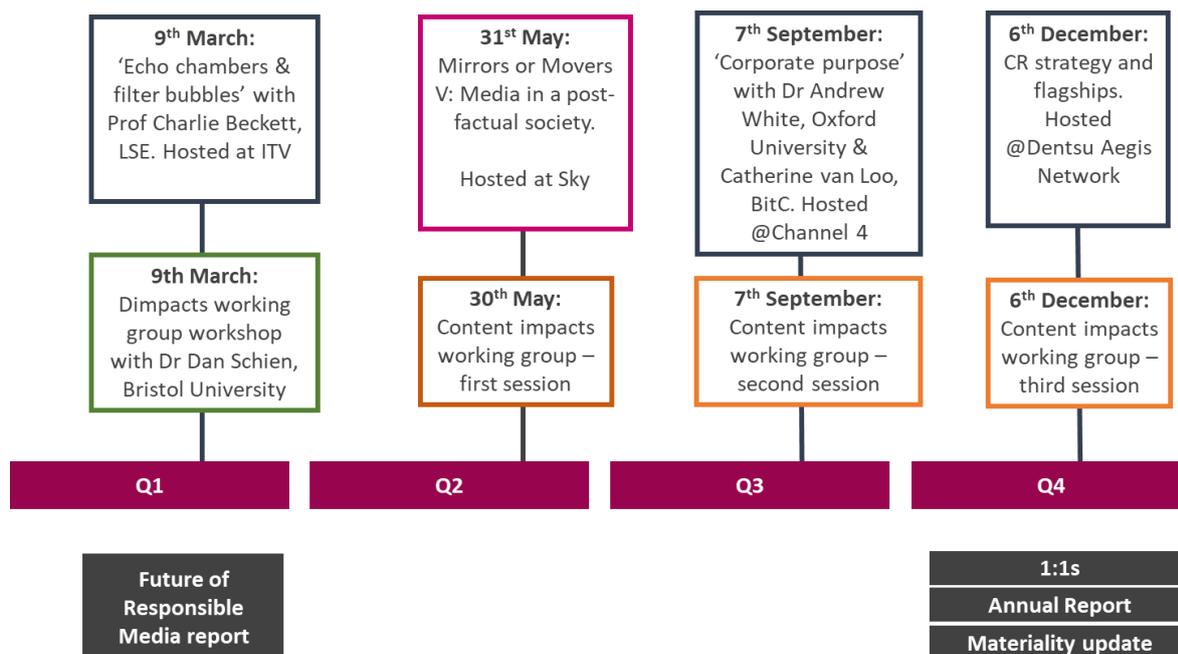
Our audience grew; with delegates at our annual conference (100) and social media followers both at their highest ever levels



"Relatively speaking, media companies make up only a small fraction of global business and resource usage, yet they command an inordinately high share of 'voice'; a voice that is both powerful and pervasive. The media sector's footprint may be modest, but its 'brainprint' is enormous."

*'Mirrors or Movers? Framing the debate about the impact of media content', 2013.*  
Toennesen, Hodgson & Mimmack





Summary of Responsible Media Forum activities in 2017

The activities of the Responsible Media Forum reflect and respond to many of the sector’s most pressing issues through discussions, events, working groups or research. This report provides a brief summary of our activities in 2017, and plans for 2018. We hope you enjoy it.

Participation in the Forum is open to large media companies operating anywhere in the world and operating in any media sub-sector(s). We are open to new participants, so if you are interested in joining please get in touch: [info@responsiblemediaforum.org](mailto:info@responsiblemediaforum.org) / +44 (0) 7962 426282.

## Research and publications

### The Future of Responsible Media

In Q1 we published [the Future of Responsible Media](#) report. Forum participants contributed their thoughts and predictions for a report written by Carnstone on the future of responsible media in a rapidly evolving world. The report falls into four sections:

Section one provides an overview of **key developments in the sector from 2005 to 2016**.

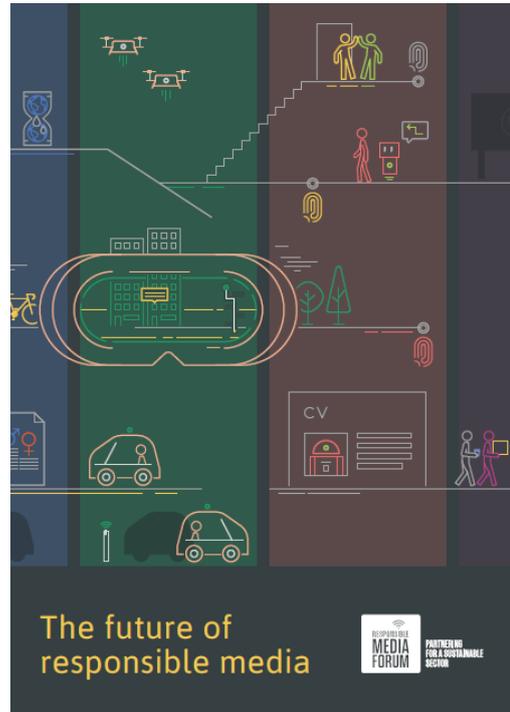
We note that the sector has come a long way. Companies have more ambitious CR programmes in place, dedicate more financial and human resource to manage their responsibilities and generally have a better understanding of their unique impacts on society. On the other hand, the sector is still in the process of finding its feet, grappling with measuring, let alone managing, its content and other core impacts.

In section two we detail the eight **social and technological forces that will change the media landscape**. The focus in this section is not on CR but rather the more fundamental changes that will affect business models and the very notion of what it means to be (and succeed as) a media company. The forces all share a common underlying theme, and that is media's shift to digital.

Section three articulates how the current state of CR is likely to be impacted by the eight transformative forces and in turn what the specific CR challenges arising from those impacts will be. This leads us to formulate four interrelated future CR challenges: and four **future challenges that we expect to separate 'good' companies from 'bad'**.

In section four we consider **what this all means** for sustainability professionals in media companies today, providing our view on what responsible media companies are going to need from their CR professionals.

Upon publication, we shared the report with 600 friends of the Forum; people who have attended our events, contributed to research or otherwise expressed an interest in CR for the media sector.



*'The Future of Responsible Media', 2017.  
Toennesen, Hodgson & Pickett*

## Reviewing media's materiality

During the second half of the year, we conducted research into the sector's big issues. Looking at what's changed since we published 'Does it Matter: An analysis of sustainability issues in the media' in 2013, we consulted with Forum participants and media analysts in the financial sector to review operational, strategic and material issues for media companies. The summary results were shared with Forum participants in Q4 2017 and the full research briefing will be published in Q1 2018.

## Forum meetings

Meetings are usually themed around a particular challenge or topic which has been nominated by Forum participants. On a quarterly basis, we invite experts to present their perspective and insights, followed by a group discussion under the Chatham House rule. In 2017, the meetings were organised around the themes below:

### Q1: 'Echo chambers and filter bubbles'

**Professor Charlie Beckett** led an in-depth discussion with Forum participants on filter bubbles and echo chambers, and how media companies can respond. Charlie is one of the world's foremost experts on news media's role in society, and a prominent figure in the debates on trust in a digital age. Previously a journalist himself, Professor Beckett is the founder of Polis, the journalism think tank at the London School of Economics. He continues to lecture and run Polis, whilst appearing regularly as a media commentator.

Hosted by ITV on 9<sup>th</sup> March.

### Q2: Mirrors or Movers V

The second quarterly meeting of the year took the form of our annual conference, a deep-dive into the impacts of media content with a focus on fake news and its relevance across different formats and business models. We invited in expert speakers to discuss and debate how responsible media companies can navigate the strategic challenges they face from several different directions: notably the rise of digital, evolving revenue models and dissolution of trust in 'establishment' channels. This annual event is free and open to the public. More details on the conference are provided later in this report.

Hosted by Sky on 31<sup>st</sup> May.

### Q3: 'Corporate purpose'

**Dr Andrew White** spoke to the Forum on the slippery topic of corporate purpose. He is a well-known voice on business performance and purpose; his presentation drew on his own academic research, as well as ancient contemplative practices. Dr White is Associate Dean for Executive Education and Corporate Relations at Said Business School, Oxford University.

**Catherine van Loo** provided a practical perspective on implementing purpose. Working directly with businesses in her role as Corporate Adviser at Business in the Community (BitC), part of her role involves inspiring companies to improve society through purpose-driven brands. She presented BitC's Purpose Toolkit, which "provides businesses with the why, what and how for creating a positive purpose".

Hosted by Channel 4 on 7<sup>th</sup> September.

### Q4: 'Setting CR strategy'

**Caroline Hill** gave her insights to CR strategy-setting from outside the media sector. Caroline is Head of Sustainability at LandSec, the UK's largest commercial property company. Caroline provided an insight to LandSec's priorities, focusing particularly on their employability programmes which support vulnerable community members whilst also building the construction talent pipeline. Prior to her role at Landsec, Caroline was COO of PWC's Sustainability & Climate Change practice.

**Fiona Ball** gave an insider's view on Sky's Ocean Rescue campaign. The large-scale programme focuses Sky's influence and resources to address ocean plastics. Fiona is Head of Responsible Business at Sky, where she has worked on the responsibility agenda since 2005, previously developing and launching Rainforest Rescue, Sky's six-year campaign and partnership with WWF to inspire customers to help save one billion trees in the Amazon Rainforest.

**Katie Buchanan** presented #workwithme, Virgin Media's bold new partnership with UK disability charity Scope. #workwithme aims to support 1m disabled people to get into and stay in work. Katie is Head of Sustainability at Virgin Media, and Chair of Ignite! Futures, a charity that uses creative learning to support young people and families.

Hosted by Dentsu Aegis Network on 6th December.

## Working groups

The Forum occasionally launches specialist working groups to address key issues of interest to certain participants. Currently, two working groups are ongoing:

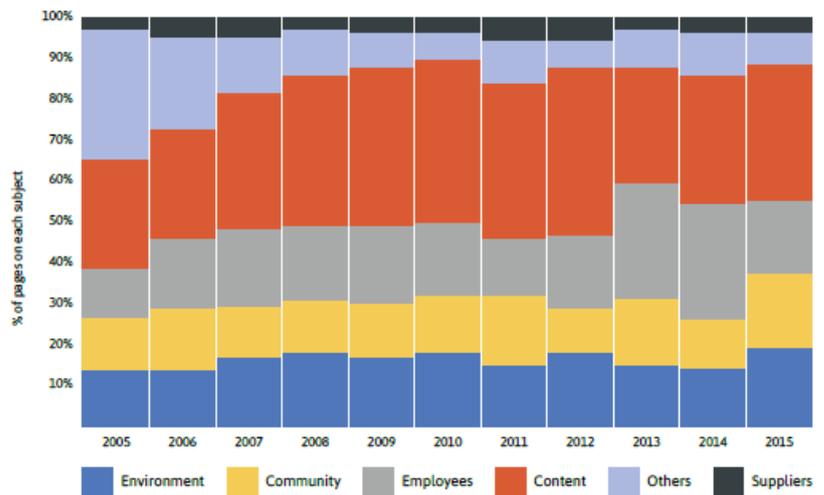
### Dimpacts: Environmental impacts of digital media

“Dimpacts” began with the aim of unpicking, measuring and managing the environmental impacts of digital media. After the carbon implications of different stages in the media content value chain, the group has focused on developing a tool to enable media companies to track the environmental impacts of their digital content. Feasibility and cost are being explored with an academic partner, Bristol University.

As part of this working group, the Responsible Media Forum has joined a techUK working group, partnering with the UK data centre industry, the Government’s Green Delivery Unit and others to understand carbon attribution across digital value chains.

### Content impacts: Measuring and managing the brainprint

Analysis of CR reporting reveals that whilst the average media CR report devotes a third of its pages to content, only 10% of KPIs fall within this area. This points to an industry that knows content is its material issue, but isn’t sure how to measure progress.



CR report content by category, based on 10 media companies analysed

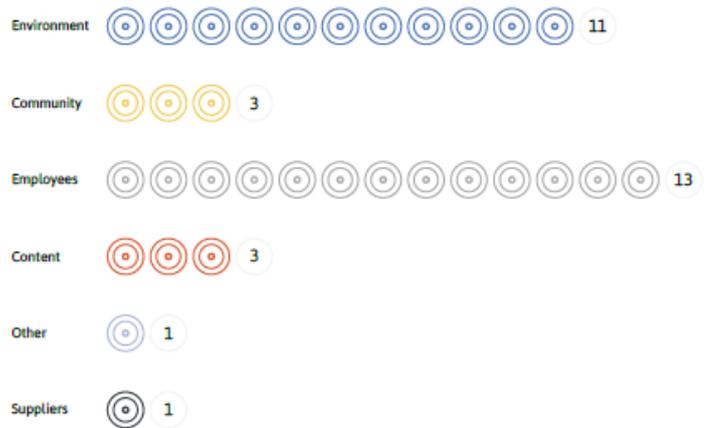
The content impacts working group, which began in Q2 2017, aims to understand and measure the societal impacts of media content.

The group began by gathering relevant KPIs and frameworks already created.

Considerations of the group include developing a framework for identifying and measuring

content impacts in media companies, and collaborating to measure impacts of a campaign with a shared goal, such as the SDGs.

To date, nine large media companies have contributed to the discussions, which have taken place over the course of three face-to-face meetings.



*Average number of KPIs per report broken down by category*

## Mirrors or Movers V

This year we delivered the fifth in our series of Mirrors or Movers conferences, each of which has focused on the societal and environmental impacts of media content. Both audience and expert speakers come from a range of perspectives and organisations, including editors and producers, academics, civil society and wider sustainability professionals; this provides a good basis for informed discussion and debate on media's role and how media companies can best manage their impacts.

### Responsible Media in a Post-Truth Age

This year's conference delved into fake news and filter bubbles, asking what the role of media companies is in a rapidly evolving and challenging context. Experts presented on diverse topics related to the social impacts of media content, exploring what the fake news phenomenon means for media responsibility and trust in institutions more broadly.

The event attracted 100 delegates from 61 organisations with headquarters in 11 different countries.

We are grateful to Sky for generously hosting the event.

Speakers at Mirrors or Movers V included:

- **Helen-Ann Smith**, Editor, Sky News
- **Mauro Silva**, Head of Brand & Digital Communications, MTG
- **Dr Marcia Balisciano**, Director of Corporate Responsibility, RELX
- **Karine Guldemann**, Chief Delegate, Elle Foundation
- **Dr Simon Hodgson**, Co-Chair, Responsible Media Forum

- **John Ryley**, Head of Sky News
- **Ben Page**, Chief Executive, Ipsos Mori
- **Baroness Onora O'Neill**, Honorable Professor & Crossbench Member, Cambridge University, House of Lords
- **Christopher Snowden**, Head of Lifestyle Economic Institute of Economic Affairs
- **Fergus Bell**, Founding Member, First Draft News Coalition
- **Renato Coen**, Head of Foreign News, Sky TG24
- **Sam Santana**, Independent factual TV and documentary editor
- **Helen Scott**, Editorial Associate, Thomson Foundation
- **Diane Kenwood**, Editor, Woman's Weekly
- **Thomas Stoeckle**, formerly Head of Strategic Business Development, LexisNexis Business Insight Solutions UK

## CONVERSATIONS AT MIRRORS OR MOVERS V

### Introducing Fake News: Material issue or re-hashed buzzword?

From Socrates to Donald Trump... The media landscape has evolved, and so too must the responsibilities of media companies. We heard from experts on the social impacts of content, the importance of trustworthy sources, fact checking, and more...

"Social media has enabled a multiplicity of messages, with two-way communication and instant feedback." – **John Ryley**



"Real, fact-based news has never been more important. **Fake news is not new, it's more prevalent.** The value of trusted news will become premium." – **John Ryley**

### Public Misperception & Questioning Trust

How do media companies navigate a landscape in which people are sceptical about *content*? Ben Page said we choose facts to suit our pre-existing biases, and that bad news has a normalising effect, leading us to believe negative behaviour is more prevalent than it is. You can see his presentation [here](#). Baroness Onora O'Neill highlighted the importance of building trust and helping readers and viewers make intelligent views on topics that matter.

"Human beings are programmed to look for negative terms." – **Ben Page**



"When we refuse to trust the trustworthy, we do so at a cost." – **Baroness Onora O'Neill**



### Post Factual Delusion & Fact Checking

Christopher Snowden argued that we would not be talking about 'fake news' if it were not for Trump and Brexit, and cautioned against greater regulation of the industry.



"Something can't be a little bit fake." – **Fergus Bell**

"TV news will be ok. Print media has to look at its emphasis on truthful, factual content for its survival." – **Christopher Snowden**



Fergus shared his [four-point plan](#) for solving the problem of fake news: improve news gathering processes, encourage news literacy, embolden newsrooms to show industry best practice, and inspire everyone to challenge social media algorithms.

### Simplify and Exaggerate

What role do editors play in creating engaging yet truthful content? How much responsibility do they carry for content integrity, across different formats?



"By simply putting in a different type of music, documentary makers change how information is presented. Do I stretch the truth to make it more dramatic? Yes. But I never misrepresent the truth." – **Sam Santana**



"If you break the trust your consumers have with your brand...you are done for." – **Diane Kenwood**

"For training journalists in the developing world, fake news protocols are absolutely necessary." – **Helen Scott**



"On the internet you can find everything...and everything can mean nothing...Do we lose truth by an editor's omission? There are many truths. 'Is something factually correct?' is a better question." – **Renato Coen**

## Online

Between them, the **Responsible Media Forum website** and the **Mirrors and Movers website**, created for the report and conference of the same name, attracted over 3,000 unique visitors in during the calendar year.

The Forum website holds all research published to date by the Forum, a complete list of participating companies and other relevant information. It was re-launched in late 2016, following the re-naming of the Media CSR Forum to the Responsible Media Forum. The *Mirrors or Movers* website hosts reports and videos, and features information relating to the four conferences held to date. It also provides a home for future work on this subject by the Forum.

The Twitter feed, established in 2010, has steadily grown its follower base to 1,250.



## The participants

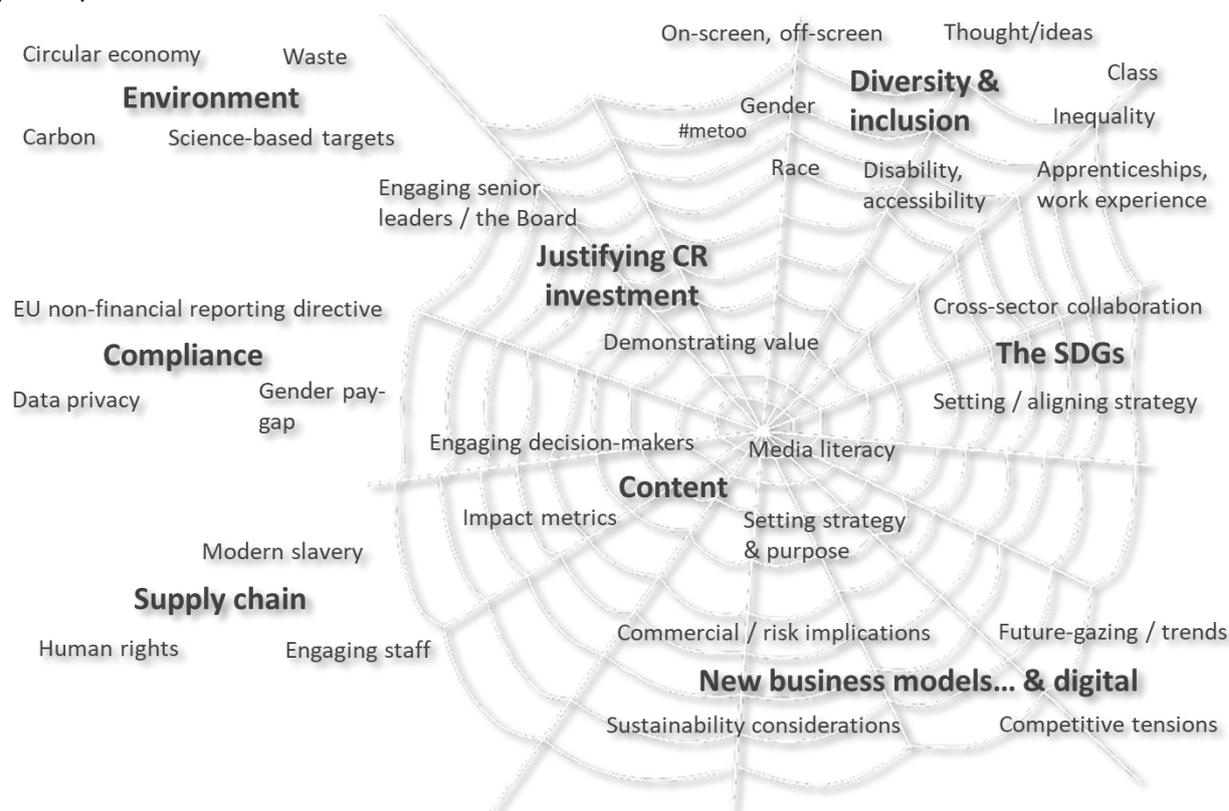
The Responsible Media Forum (the 'Forum') is a partnership between 24 major media companies to identify and take action on the social and environmental challenges facing the sector. The Forum has been going since 2001, starting as a UK initiative but with participants now drawn from all over the world.

Participants represent the full breadth of the media spectrum, from public service broadcasters, to data analytics providers, to advertising agencies and event organisers. Individual representatives include CR Directors, HR Directors, Company Secretaries and Directors of Risk, Audit and Compliance. Together, we work to define and develop responsible business practices for the media sector.

## Plans for 2018

### Forum meetings

Following a consultation with Forum participants, our 2018 programme of activities will reflect the following topics and themes which are at the top of the agenda for many Forum participants:



The programme will include quarterly meetings centered around expert speakers, the annual conference, and specialist sessions or working groups on an extraordinary basis.

### Mirrors or Movers VI

The Forum plans to host a sixth conference in 2018. This will be a one-day event taking place in central London. As always, it will be free to attend and open to the public. The conference will further explore how media content influences society and how media companies can adopt effective strategies to manage these impacts.

## Materiality publication

In Q1, we will publish a short report on the state of materiality in media, demonstrating which issues have become more important, and whether any new issues have emerged. Drawing in views from media companies and investment analysts, this will be an update to our previous publications on the sector's key issues: '[Does it Matter?](#)' (2013), '[Mapping the Landscape](#)' (2008) and '[Media CSR Forum Key Issues](#)' (2005).

## About the Forum

### Objectives

The Forum provides a platform for participating companies to:

- Learn from each other and leading organisations in other sectors;
- Identify trends and areas for prioritisation based on sound research and robust discussions;
- Engage with stakeholders, be they campaigners, policy makers, academics or peers; and
- Run collaborative projects and events on key issues.

In short, the Responsible Media Forum gives participating companies access to insights and collaboration that few organisations could manage on their own. The Forum produces an Annual Report on its activities. This is the Report for 2017.

### Participating in the Forum

Participants benefit from an open environment in which to discuss, under the Chatham House rule, the sustainability issues faced by the sector. The Forum is able to use its collective size to engage with a range of key stakeholders on the most pressing issues, both through internal meetings and public events. Lastly, the Forum produces original research. Participation is restricted to large media companies. The participation fee for 2018 is £2,325.

## Income

The Forum budget comes entirely from participation fees. Having previously been organised as separate projects, in 2015 the Nordic Media CR Forum (Nordic) merged with the Responsible Media Forum (UK).

	2014	2015	2016	2017
<b>UK</b>	£36,600	£45,000	£46,600	£49,500
<b>Nordic</b>	£8,200	NA	NA	NA
<b>Total</b>	£44,800	£45,000	£46,600	£49,500

## Governance

The Responsible Media Forum is a multi-client project run by Carnstone Partners LLP, with a project team consisting of Simon Hodgson, Christian Toennesen and Rosie Towe. We are open to new participating companies, as well as input and enquiries about media sustainability from investors, academics and the third sector, but please note that we are unable to provide funding for projects and research, however interesting and worthwhile they may be.

Carnstone meets on a 1:1 basis with participants at the end of each year to gather feedback on how the Forum is meeting their needs and to discuss potential themes and speakers for the following year. Actions and initiatives arising from this review are then discussed and agreed by participants in a consensual manner.

Christian Toennesen is the first point of contact for stakeholders and new member enquiries:

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